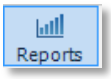
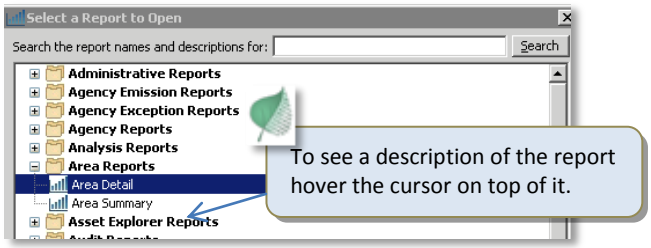
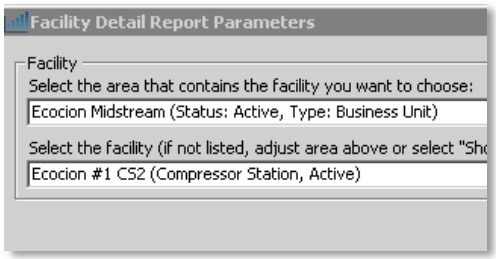
ACTS Reports



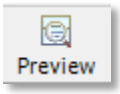
View ACTS data in Detail Reports in the Asset Explorer or by running reports. ACTS aggregates data and creates useful analytical reports. The Reports tool lists the various available reports. Additional custom reports (i.e., ad hoc reports) can be created as needed by the user or the program team. Contact an ACTS Administrator to request a new report be built.

1. Select **Reports** from the toolbar
   or select **Reporting→Reports** from the menu bar.
2. Enter search criteria into the Search the report names and descriptions for: text box and select the **Search** button. Reports that match the search criteria will be highlighted.
   or
2. Expand the report category by selecting the "**+**" icon next to the category name.
3. To open a report, double-click on the report or select the report, then **Open**.
4. The **Report Window** will open.
5. Select the specific parameters for the report, if required.
6. Select **OK**.
7. The report will open.




Facility Detail Report Parameters
Facility
Select the area that contains the facility you want to choose:
Ecocion Midstream (Status: Active, Type: Business Unit)
Select the facility (if not listed, adjust area above or select "Sh
Ecocion #1 CS2 (Compressor Station, Active)

Print Preview Window

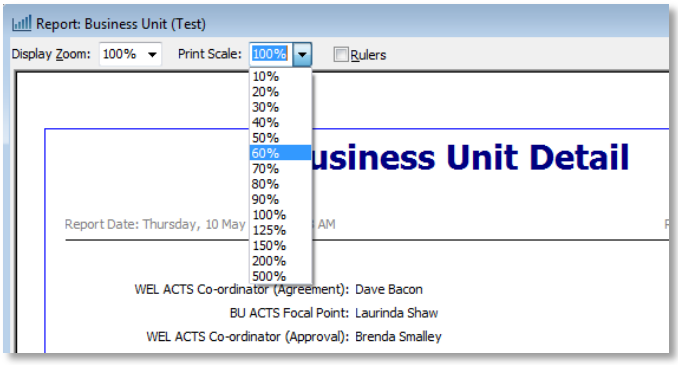


The **Print Preview Window** allows the user to view, print or save report data. It can be accessed in two ways:

1. When an item in the Asset Explorer is selected and a Detail Report is available, select the **Preview** icon on the Toolbar.
   or
1. When a report is active, select the **Preview** icon on the Toolbar.

2. Adjust the following:

   - Display Zoom is used to adjust the size of the report in view (it does not affect the printing size). Selecting Fit Width sets the display zoom to be the largest percentage that completely fits all of the horizontal information.



- Print Scale is used to adjust the amount of information that is placed on a page. For example, changing the print scale to 50% will make a report half the default size, thereby fitting twice as much information on the page.

- Rulers is a checkbox that will show or hide the rulers. When the rulers are visible, the user may change the margins by moving the margin indicators.

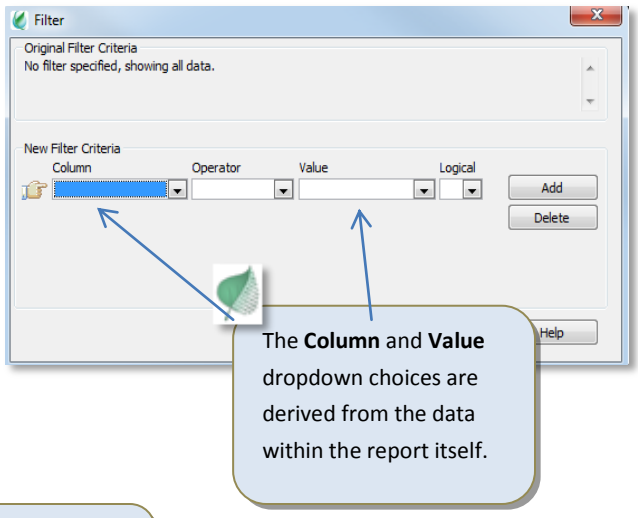
3. To print, select the **Print** icon on the toolbar, select **File → Print** from the menu bar, press **CTRL-P**.

Filter Reports

Filter data in a generated report.

1. Select **View → Filter** from the menu bar.
2. The **Filter Window** will open.
3. Input the filter choices:

   - Column: Select the report **column** to be filtered by from the dropdown.
   - Operator: Select the operator from the dropdown.
   - Value: Select the value to be filtered.
   - Logical: Use this when running more than one filter at a time.
4. Select **OK**.

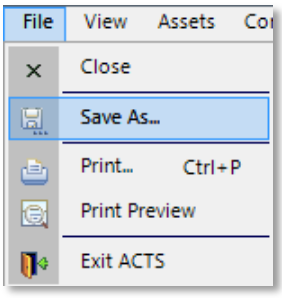


The **Filter** option is not available on every report.

Once a filter is set, another filter will not be applied to the existing filter. To change the filter or to create a new one, start these steps over.

Save/Export from ACTS

Reports can be saved from ACTS (exported) when the **Print Preview Window** is selected. For ACTS implementations with Software-as-a-Service (SaaS), function such as File/Save As will default to the serve's hard drive as a starting point. To access the local or network drives, use the "Client C (M:)" references, such as Client C for the C-drive.



1. Select **File→Save As…** from the menu bar.
2. Select a location to save to.
3. Enter a File Name**.**
4. Select the file type from the Save as type: dropdown.
5. Select **OK**.

Schedule Report Deliveries

View or schedule the automatic email delivery of one or more reports.

ACTS Administrators have the option of using the **Show report deliveries for everyone** checkbox on the Report Delivery screen.

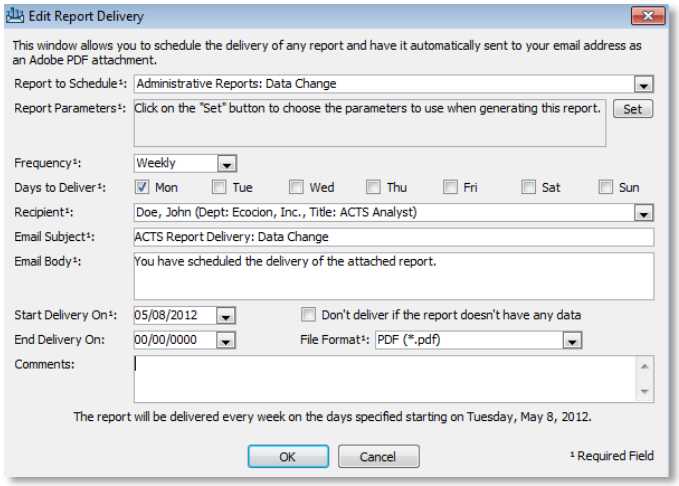
1. Select **Reports** from the toolbar
   Or select **Reporting→Reports** from the menu bar.

2. Select **Schedule Delivery** at the bottom of the window.

3. The **Report Delivery Window** will open displaying a list of currently scheduled deliveries for the current user.

4. Right-click in the gray area and select **Add** to create a data row or select **Edit** to update an existing report delivery. To remove the scheduled delivery of a report, in the Report Delivery window, right-click on the scheduled report and select **Delete**.

5. The **Report Delivery Window** will open displaying the information regarding the specified report delivery.


Edit Report Delivery
This window allows you to schedule the delivery of any report and have it automatically sent to your email address as an Adobe PDF attachment.
Report to Schedule¹: Administrative Reports: Data Change
Report Parameters¹: Click on the "Set" button to choose the parameters to use when generating this report.
Set
Frequency¹: Weekly
Days to Deliver¹: Mon Tue Wed Thu Fri Sat Sun
Recipient¹: Doe, John (Dept: Ecocion, Inc., Title: ACTS Analyst)
Email Subject¹: ACTS Report Delivery: Data Change
Email Body¹: You have scheduled the delivery of the attached report.
Start Delivery On¹: 05/08/2012
Don't deliver if the report doesn't have any data
End Delivery On: 00/00/0000
File Format¹: PDF (*.pdf)
Comments:
The report will be delivered every week on the days specified starting on Tuesday, May 8, 2012.
OK
Cancel
¹ Required Field

6. Enter the following information:

   - Report to Schedule[1]: Select the **Report** from the dropdown.
   - Report Parameters[1]**:** (If applicable) Select **Se**t and choose **Report Parameters** as prompted.
   - Frequency[1]: Select **Frequency** for report delivery from the dropdown.
   - Days to Deliver[1]: Check the boxes of the days of the week to deliver reports.
   - Recipient: Select the user to receive the report from the dropdown. (ACTS Administrator Only)
   - Email Subject[1]: Edit text for the desired **Email Subject.**
   - Email Body[1]: Edit text for the desired **Email Body.**
   - Start Delivery On[1]: Select the date to begin deliveries.
   - End Delivery On: Select the date to end deliveries.
   - Don't deliver if the report doesn't have any data: Check this box to only receive the report if it has data.
   - File format[1]**:** Select the **File Format** to be delivered from the dropdown.
   - Comments**:** Enter additional notes on the report delivery in the text box.

7. Select **OK**.